

## Ultima Forma Limited customer privacy notice

This privacy notice tells you what to expect us to do with your personal information.

- [Contact details](#)
- [What information we collect, use, and why](#)
- [Lawful bases and data protection rights](#)
- [Where we get personal information from](#)
- [How long we keep information](#)
- [How to complain](#)

### Contact details

Post

Unit 9 Cufaude Business Park, Cufaude Lane, Bramley, Tadley, Hampshire, RG26 5DL, GB

Telephone

07771808077

Email

[kerrie-anne.payne@ultima-forma.com](mailto:kerrie-anne.payne@ultima-forma.com)

### What information we collect, use, and why

We collect or use the following information to provide services and goods, including delivery:

- Names and contact details
- Addresses
- Purchase or account history
- Payment details (including card or bank information for transfers and direct debits)
- Account information
- Call recordings
- Records of meetings and decisions
- Information relating to compliments or complaints

We collect or use the following information for the operation of customer accounts and guarantees:

- Names and contact details
- Addresses
- Payment details (including card or bank information for transfers and direct debits)
- Purchase history
- Account information, including registration details
- Information used for security purposes
- Marketing preferences

We collect or use the following information for service updates or marketing purposes:

- Names and contact details
- Addresses
- Marketing preferences

- Records of consent, where appropriate

## Lawful bases and data protection rights

Under UK data protection law, we must have a “lawful basis” for collecting and using your personal information. There is a list of possible [lawful bases](#) in the UK GDPR. You can find out more about lawful bases on the ICO’s website.

Which lawful basis we rely on may affect your data protection rights which are set out in brief below. You can find out more about your data protection rights and the exemptions which may apply on the ICO’s website:

- **Your right of access** - You have the right to ask us for copies of your personal information. You can request other information such as details about where we get personal information from and who we share personal information with. There are some exemptions which means you may not receive all the information you ask for. [You can read more about this right here.](#)
- **Your right to rectification** - You have the right to ask us to correct or delete personal information you think is inaccurate or incomplete. [You can read more about this right here.](#)
- **Your right to erasure** - You have the right to ask us to delete your personal information. [You can read more about this right here.](#)
- **Your right to restriction of processing** - You have the right to ask us to limit how we can use your personal information. [You can read more about this right here.](#)
- **Your right to object to processing** - You have the right to object to the processing of your personal data. [You can read more about this right here.](#)
- **Your right to data portability** - You have the right to ask that we transfer the personal information you gave us to another organisation, or to you. [You can read more about this right here.](#)
- **Your right to withdraw consent** – When we use consent as our lawful basis you have the right to withdraw your consent at any time. [You can read more about this right here.](#)

If you make a request, we must respond to you without undue delay and in any event within one month.

To make a data protection rights request, please contact us using the contact details at the top of this privacy notice.

## **Our lawful bases for the collection and use of your data**

Our lawful bases for collecting or using personal information to **provide services and goods** are:

- Consent - we have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.
- Contract – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.
- Legitimate interests – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:
  - We’re compiling target lists for marketing purposes to deliver information regarding our products and to invite targets to attend our webinar, should they wish to do so. We will not keep their data should they not reply or respond after we make contact with them twice. We’ll take this as a not interested and delete their data.

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

Our lawful bases for collecting or using personal information for the **operation of customer accounts and guarantees** are:

- Consent - we have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.
- Contract – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.

Our lawful bases for collecting or using personal information for **service updates or marketing purposes** are:

- Consent - we have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. To be clear, you do have the right to withdraw your consent at any time.
- Contract – we have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.
- Legitimate interests – we’re collecting or using your information because it benefits you, our organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:
  - We’re compiling target lists for marketing purposes to deliver information regarding our products and to invite targets to attend our webinar, should they wish to do so. We will not keep their data should they not reply or respond after we make contact with them twice. We’ll take this as a not interested and delete their data.

For more information on our use of legitimate interests as a lawful basis you can contact us using the contact details set out above.

## Where we get personal information from

- Publicly available sources
- Providers of marketing lists and other personal information
- Suppliers and service providers

## How long we keep information

Data Type	Retention Period	Legal / Business Basis	Disposal Method
<b>Client account information</b>	6 years after contract end	Contractual obligations, limitation for legal claims	Secure digital deletion
<b>B2B marketing contacts</b>	2 years from last engagement or until consent withdrawn	GDPR – legitimate interest or consent	Secure deletion / opt-out tools
<b>Sales records and correspondence</b>	6 years	HMRC requirements, contract evidence	Secure digital deletion
<b>Supplier contracts &amp; documentation</b>	6 years after contract end	Contractual/legal requirements	Secure deletion
<b>Invoices, purchase orders, receipts</b>	6 years	HMRC and accounting regulations	Secure deletion / shredding
<b>CRM data (notes, interactions)</b>	2–3 years post-inactivity	Business use, GDPR compliance	Review, archive, or delete
<b>Internal financial records</b>	6 years	Companies Act 2006	Secure deletion
<b>Personnel records (employees)</b>	6 years after departure	Legal compliance (employment law, HMRC)	Secure deletion
<b>Recruitment data (unsuccessful)</b>	12 months	GDPR – legitimate interest	Secure deletion
<b>Email correspondence</b>	2–6 years depending on context	Business continuity, evidence	Secure deletion
<b>Website analytics data</b>	26 months or less	GDPR – legitimate interest	Automated deletion
<b>IT system logs (access, error, audit)</b>	12 months	Security, troubleshooting	Automatic or manual deletion

For more information on how long we store your personal information or the criteria we use to determine this please contact us using the details provided above.

## How to complain

If you have any concerns about our use of your personal data, you can make a complaint to us using the contact details at the top of this privacy notice.

If you remain unhappy with how we've used your data after raising a complaint with us, you can also complain to the ICO.

The ICO's address:

Information Commissioner's Office  
Wycliffe House  
Water Lane  
Wilmslow  
Cheshire  
SK9 5AF

Helpline number: 0303 123 1113

Website: <https://www.ico.org.uk/make-a-complaint>